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FinancialPlanning

Wealthtech Weekly

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Reporter

As the last few days of the year tick by, it's clear that the only constant for wealthtech in 2025 will be change.

Advancements in AI, helping advisors cater to DIY investors and providing access to alternative assets and private markets are some of the trends coming next year.

For some perspective, I spoke with 10 experts about what they feel will be some of the most important themes in wealthtech in 2025.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Happy Holidays! Talk to you next Thursday!

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Expert predictions for wealthtech and financial planning in 2025

Advancements in AI, helping advisors cater to DIY investors and providing access to alternative assets and private markets are some of the trends coming next year.

- **Using SEO to boost passive lead generation for advisors**
  By effectively redesigning their websites, firms can target prospects who may already be searching for the services they provide.
- **Sustainable investors expect sector growth, but not from them**
  ESG and like investments have come under fire, but a US SIF report seems to see some positivity in the sector despite concerns about greenwashing and greenhushing.
- **New TIFIN Give feature allows for public DAF campaigns**
  In time for the season of giving, the new functionality allows those on the philanthropic planning platform to encourage others to join them in supporting causes they care about.
- **2025 expert predictions: The year ahead for wealth management**
  From cryptocurrency to Medicare, 2025 is likely to be a year of change. Here's what nine experts are forecasting.

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